

One Stop Shop: Project Management Standard Operating Procedures

Objective:

Communication between a permit applicant and City staff is essential for a timely and concise review of an application. In an effort to emphasize its importance and strengthen its role in the process the Chief Plans Official (CPO) has implemented a project management approach for projects. The main objective of each Project Manager (PM) will be to serve as the point of communication between the department reviewers and the applicant, ensuring that review times in each section are running on time and that any corrections, alterations or questions are received from the applicant and given to the reviewers in an expedited fashion.

The PM should utilize a proactive approach for this process, reaching out to check on the status of applications, where they are in the process and if they will be approved by a certain section within the expected timeframe. As issues arise, the PM should work towards conflict resolution, attempting to gather any missing information or working to reach a resolution when there is a disagreement between different sections which results in a delay of the plan's approval.

Workflow:

When a new application is submitted, the applicant must provide a single point of contact that the PM will be able to communicate with directly throughout the approval process. After intake, the CPO will assign a PM based on the project's size and the current workload of each PM. The CPO will contact the PM when a new project has been assigned to them via e-mail and provide all of the initial information related to the project. Additionally, the PM and their contact information will be noted on the CAP screen in Accela so that everyone involved in the approval process will know who to communicate with. The CPO will still be responsible for the larger and extremely time sensitive projects.

It is essential that the PM be involved from the very beginning of the process to ensure that no steps are missed. Upon receipt of a new project assignment the PM should contact the application's representative, introduce them self, provide their contact information, and explain their role. It is important that the PM stress that any questions or concerns should be directed to them in order to eliminate an untimely delay in responses. The PM should also inform the representative that they will be providing them with periodic updates on where the plan is in the approval process and the projected date of completion as it moves through the system.

The PM will serve as the main point of contact for the customer, answering any questions they may have and directing any information that they need routed to the various divisions. It is imperative that all inquiries that are received from the customer are responded to in an expedited manner and to the best of their ability. They will also serve as a point of reference for City staff that may need an update on the project or the PM's assistance in gathering information.

As the plan begins to move through the approval process, it will be the responsibility of the PM to ensure that the plan is being reviewed in a timely manner and that staff has all necessary information on hand for the review. It is the responsibility of the PM to contact a reviewer one to two days before the anticipated approval to see if the reviewer is still on track or if they are behind schedule. If they are behind schedule, the client should be contacted and provided the details. In addition to these routine calls, the PM should check periodically to ensure that the reviewers do not have any questions or need any additional information from the client. If concerns do arise, the PM is tasked with contacting the client to get the necessary information and inform them of the delay and how it will effect the projected completion date.

If there are issues that arise due to differing opinions between reviewers, the PM will work with all parties involved to facilitate a resolution. If the PM is not able to reach a resolution, the CPO will be contacted to assist in mitigating the situation. If needed, the CPO will involve the necessary Directors or their designees in order to solve the conflict and get the project back on track.

The PM will be involved and tracking the project until the final site compliance plan and all related engineering plans are approved.

Duties & Responsibilities:

- Communicate regularly with the customer/ applicant
- Facilitate any conflicts that arise with regard to their assigned projects
- Assist reviewers in gathering any necessary information that was not included in the original application
- Provide regular status updates for the applicants on where their plans are in the process and any delays that may arise
- Proactively work to ensure that plans are reviewed in a timely manner and according to the standard timeframes.